DOCUMENT RESUME

ED 144 559 IR 005 127

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TITLE A Report on Facilitating Educational Change with Local School Districts through the National Diffusion Network.
SPONS AGENCY Office of Education (DHEW), Washington, D.C.
PUB DATE 76
NOTE 21p.

EDRS PRICE MF-$0.83 HC-$1.67 Plus Postage.
DESCRIPTORS Change Agents; *Information Dissemination; Models; *Networks; Program Descriptions; *Program Development; School Districts
IDENTIFIERS Linking Agents; Project LINK: National Diffusion Network

ABSTRACT

The National Diffusion Network was initiated in 1974 by the United States Office of Education (USOE). Thirty states developed state facilitators the first year and 36 states had facilitators the second year. Among the facilitators in the network, there appears to be considerable difference in the approaches that are taken to diffuse the projects that have been identified by USOE/NIE and the Joint Dissemination Review Panel. Most of the differences reflect the range of theory found in the literature regarding dissemination and diffusion. When examining the available knowledge and experience available to linking agents, it became clear to the LINK staff that some clear choices had to be made. There are at least three general models than can be identified as relating to State Facilitator work (Education Program Facilitators): (1) product/knowledge dissemination; (2) process change model; and (3) the interactive model. This paper is concerned with some of the conclusions the LINK staff has made about facilitating change and ways to train people to do it. (Author/BBM)

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WHAT IT WAS LIKE MOVING WEST

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WHO WAS THAT MASKED MAN

WITH THE NATIONAL DIFFUSION NETWORK

IR005 127

A REPORT ON FACILITATING EDUCATIONAL CHANGE

WITH LOCAL SCHOOL DISTRICTS

THROUGH THE NATIONAL DIFFUSION NETWORK

Two Year Report
July 1974-July 1976

Project LINK

Kansas State Facilitator

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Title III Section 306 Office

Kansas State Department of Education
Title IV C Office

Wichita Public Schools
Curriculm Services Division

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PROLOGUE

In developing this report, a very rough first draft was sent to several people asking them to respond with suggestions and criticisms. We sent this first rough draft to other state facilitators, D/D's, clients, KSDE, USOE and others. At the end of the paper is a list of those who responded. Each of these people made a contribution, as their suggestions were included in the final draft. We of course reserved the right to be selective, but every respondent will identify part of himself/herself in this final paper.

As I mailed out the rough draft I suggested to the staff that I really hoped we got some good responses relating to content, but I hoped they left my style alone. We received some excellent comments and suggestions on content and clarity. However, all those little phrases that I had thrown in for wit and humor, did not seem to strike the respondents as either witty or humorous. Almost to a letter they were struck down; except for Mathew Miles who said nice things about direct flavor. You and I know Matt.

I appreciated this kind of response, because it indicated that the respondents had taken the paper seriously and wanted me to be serious. But, my ego was battered. I find it difficult to read this many pages without some attempt to alleviate boredom. I also find it difficult to take myself that seriously, most of the time. Therefore, I have reached a compromise. I will include below all thoses statements that were deleted at the request of the respondents.

As you read this paper and begin to get bored, turn to this section and insert one of the statements wherever it seems appropriate!

Who was that masked man?

Being slow learners we,

We were dumb to think that.

That was no masked man, that was the lone facilitator.

It is the only response when one has been ambushed.

Same to you, fella.

Give 'em mush.

That's what it was like, moving West.

Ralph

INTRODUCTION

The National Diffusion Network was initiated in 1974 by USOE. Thirty states developed state facilitators the first year and thirty-six states had facilitators the second year. Among the facilitators in the network, there appears to be considerable difference in the approaches that are taken to diffuse the projects that have been identified by the USOE/NIE JDRP (Joint Dissemination Review Panel). Most of the differences reflect the range of theory found in the literature regarding dissemination and diffusion. When examining the available knowledge and experience available to linking agents, it became clear to the LINK staff that we had some clear choices to make. There are at least three general models that can be identified as relating to State Facilitator work (Educational Program Facilitators). In our naivete', we felt we had to pick the model that best suited our goals as an organization and go with it, adapting as necessary. It took a year to learn that: (a) it was an error to assume any one model was correct, (b) our model that emerged did not seem to fit any of the three we'd identified and, (c) doing it the way we did was an excellent way to learn and to train a staff.

We identified the three main models as:

1. Product/Knowledge Dissemination Model

   This model can be identified with the writing of several who identify change as a research issue. It seemed to us the basic assumptions were to be questioned. This model assumes that the world is composed primarily of rational users and rational developers. Therefore, rationally developed products are the answer. The linking agent in this system works as if the product and/or knowledge were his/her client. This model assumes that adoptions and adaptation are dissemination (communication) problems. We rejected this model, as a staff, because: (a) we did not and do not believe the world of users and/or developers to be rational, (b) book companies, regional laboratories, educational technologists, and others have followed this model for years without any discernable success. Our conclusion was that product/knowledge systems did not seem to effect much change (except for one product for another).

2. Process Change Model

   The second model we looked at was a process change model, basically identifies with Rogers and others. This model assumes that change is a human thing and, therefore, is a process of human decisions and choices (not necessarily rational). It also assumes that this process is identifiable as a rational system, although each decision maker within might be making decisions on an irrational basis. This model has 5 steps beginning with awareness to adoption/adaptation (some add a sixth step - implementation). This model was

selected as the model for our planning and linking activities. It seemed to us that this model made sense because: (1) it was people oriented, (2) it allowed organizations and people to progress at their own rates, and (3) it allowed LINKers to structure their time and activities.

3. Interactive

The third model can be identified as an interactive one. It takes the view that one goes into the field and interacts with a client and then reponds to whatever seems most appropriate to meet that client's needs. We rejected this model (we thought) because it relied on an artist-charismatic linking agent. We felt we weren't these kinds of people and no one seemed to know how to teach us to be. Indeed, in this model there did not seem to be any clear indentification of knowledge, skill or attitude that could be learned. While the model seemed to be very client oriented, we couldn't really get a handle on what to do with clients and how we could help them change.

Many of the thinkers and writers who may have been identified in the past with one of these models, are now beginning to talk and write about what is called the linking role. While most of these "experts" maintain flavors of their previous work, it is also clear that a growing consensus about the linking role is emerging. Often the disagreements center around meanings and definitions of terms. It is now our firm conviction that, in fact, what we do as linking agents is all of the above. We would probably resemble most an interactive model at this time. We are convinced that we got there, however, by acquiring the skills, knowledges and attitudes of the Product and Process models and then trained ourselves with some Organization/Development Management Skills. This paper will concern itself with some of the conclusions we have made about facilitating change and ways to train people to do it. This is our experience to date and should be treated in that narrow confine. We have learned much these first two years. We expect to learn more. We would expect that some of what we say below will change as we change and grow. Nevertheless, what follows is what it was like for us, "moving West, as a facilitator".

Phase I - Owning the Problem

A. Making Contact

The Roger's model indentifies three first steps: (a) awareness, (b) interest, and evaluation. The product models identify: (a) problem, (b) alternatives, and (c) decision. We have come to the conclusion that, interactively, they result in similar activities and are part of Phase I, "You Gotta Know Your Territory". Knowing about

your territory relates to knowing the people and how they decide; not geography. Strategies for making contact with the territory are:

1. Brochure

   A general kind of awareness brochure identifying the overall purpose of linking agents and where they are located should be developed. A separate or attached response card should be used. These brochures can be used for blanket mailout, exhibits, meetings and responses to inquirers. The separate return card produces a seven percent response. The attached response card produces about a five percent response. In both cases where the brochures are used to blanket every school district, at least one person from one third of all Kansas school districts responds. The following groups are included in blanket mailings:

   a. Superintendents

   b. Building Administrators

   c. Staff Administrators

   d. Board of Education Presidents and Members

   e. Local NEA (National Education Association) and AFT (American Federation of Teachers) Presidents

   f. Local NEA Building Representatives

2. Exhibits

   The results of exhibits have been essentially not worthwhile for meeting or getting to know new clients. If after being in operation a while, some client adopters are identified then, an exhibit can be arranged at a meeting that will provide adopter/clients a chance for recognition, then it is good technical assistance for a LINKer to exhibit. Also some of the client/adopters peers may show up and aide the LINKer in making contract.

3. State Meetings

   Chances to meet school people at statewide meetings offers a chance for really meeting new clients. If possible, such arrangements should be made through client/adopters. If

possible, let clients do most of the presenting about what they've done that has been successful. For a LINKing agent, peer to peer is much better than tooting your own horn. Some state meetings where this can be done are: (1) state meetings for school board members, (2) state elementary principals, (3) state secondary principals, (4) KASCD, (5) small school meetings, (6) large school meetings, (7) state school administrative meetings, (8) state subject matter area meetings, (9) etc.

4. Topical Meetings

Area topical meetings can be held in the state dealing with problems that schools have and with which the LINKing agency can assist. Examples of these might be: (1) needs assessment, (2) conflict management, (3) communications, (4) team decision making, (5) information system, etc. All these and others represent activities that the LINKing agency could do with clients. While topical meetings are going on, it gives the LINKing agents opportunities to meet school people personally and identify those who would like to have a follow-up call.

5. Client/adopter Meetings

Very often it is possible to assist an adopter/client in inviting his neighbors over for the day. The adopter/client can share his/her excitement over the successes that have resulted from the relationship with the LINKing agents. The LINKing agent plays (models) the supporting role, encouraging the client/adopter to do most of the presenting and talking. The LINKing agent should be a responder and helper.

6. Advertisements

Advertisements in state professional magazines are possible. However, they are expensive and the response level is low. This technique probable ranks above exhibits, but not much.

7. Other P. R.

It is often possible to get on radio and T.V. programs as a guest. Stories about the LINKing role can be placed in newspapers or professional magazines. Typical P.R. activities can be carried out. However, it is still best to try and get this accomplished so that an adopter/client is involved concerning their success. His/her remarks will include the role played by the LINKing agency.

Phase I - Owning the Problem

B. Learning More

The next area of Phase I is a beginning of what will become, in many cases, a close relationship. As a result of all the activities to make contact with clients, there will have been some who have indicated that they would like to know, "What do I do now?". The answer to this will vary:

1. Response to awareness mailings:

   When mailings have been sent to clients for awareness purposes, a response card requesting information back from the client is included. When these cards are returned, you will have gathered more information about the client; the most important of which is that the client wants to know more. A regular system should be set up to handle this response. Such are response might be: (a) a letter to the responder acknowledging the response, giving more information about the LINKing agency, promising a personal contact, and providing a warm fuzzy. If the response has not been from the superintendent, then a similar letter to the Superintendent stating that someone from the district has responded and likewise promising the Superintendent a personal contact; (b) within two weeks, a phone call by one of the LINKing agents should be made to the Superintendent. The purpose is: (1) to find out more, (2) establish a beginning relationship, (3) make appointment for an on-site visit and, (4) if others besides the Superintendent responded, include this information in the phone call.

2. Response to contacts at meetings, conferences, etc:

   Whenever contact is made with a client at some kind of meeting, a record of this should be made along with any pertinent data learned. Within a short time (two or three weeks), a return call to that person and/or the Superintendent of the district (if the Superintendent was not the original contact), should be made. The purpose of the call should be the same as the mailing response. Sometimes this can be taken care of at the time of contact.

3. Listening:

   One of the skills needed by a facilitator is the ability to listen to what is really said. It would be natural for us to advise facilitator training in Active Listening. That skill from Transactional Analysis is very important; however, many people view that as manipulation. So, what is important is that the facilitator listen and ask non-judgemental/clarifying questions.

It is important to get accurate data. It is also surprising to most of us to discover that active listening promotes better understanding. Sometimes we learn more from how a person listens to us than from what is "told" us.

4. Needs:

From the first, as the facilitator begins to interact with clients, it is necessary to try and get a handle on what the needs of the client are. In many cases, the problem or concern that is first expressed by the client is not the real problem or need. Whenever possible, if some sort of needs assessment hasn't been done, it is good to suggest it and offer help. In cases where this doesn't seem practical, then try to get some data on how the need has been identified. It is important for everyone that the need be identified and clarified, so all understand it. Very often, the real problem is a staff problem or community problem that is being expressed as a program problem. This is important information to know, if a good match is to be made later on. However, the second purpose for which you are there is to begin to develop a closer working relationship with the client. The main function is to offer help and support. There is a fine line when a harder push for more data will be counterproductive. There is no rule. The facilitator must listen, smell and taste the situation and know when it's time to move on to the next step, or tip your hat and slowly walk away. At this time, keep your damn catalog and other solutions at home. Don't load the gun until you know the target.

5. Identify the Organizational Structures:

Very early-on, it is important to identify the formal and informal organizational structures. Encourage the client to involve key people as early as possible. Who the key people are will vary. Don't be fooled by roles. The facilitator's goal ought to be to get the best decision with as wide an ownership as possible. However, each district is different and it is not the role of the facilitator to judge or impose management strategies. It is the role to serve as consultant/ advisor on change strategies.

6. Be a Friend of Man (On-Site Visit):

Very often the client will want to involve you in what may seem to be unrelated activities. (e.g. visit this class, go see Ms. Finkendorf's room, meet a board member, go have coffee

or just visit at the local greasy spoon, have lunch in the school cafeteria (ugh), etc.) Regardless of how inappropriate the activity may seem or how busy you feel, do it. The client is wanting to share with you for some reason. Don't miss this opportunity. Certainly, if you are going to ask the client to work with you and risk with you, you must be will to do the same. However, this sometimes requires that you spend four to five hours on a visit you expected to last one to two hours. This means the LINKing agent must not schedule to tightly. If it appears that a call is going to run into the next one, call the next one and re-arrange the appointment. If at all possible, do not leave one client before the client is ready, in order to meet with another client. The reasons for this are; (1) if you leave one client for another, the implication is that the second client has a higher priority, (2) it makes the point that you meet client needs, (3) the second client will understand if he/she receives the same consideration and, (4) sometimes none of the above is right and you must do what seems to be right at the time.

7. Information Input:

As a practice, the on-site visit should produce some data for the facilitator concerning general areas of concern and problems the district is considering. The facilitator should offer the services of (1) Information Systems, the need for one or more searches should be identified. (2) The persons to receive the searches should be identified. (3) A time should be set for the facilitator to return and assist in the processing the information from the searches. This time should be no longer that one month. The faster the turn around time the better. The longer the time the more enertia that can build up.

8. The Easy Win:

At times at this point, a very directive client may say, "I know what I want and it is X". Usually this will be a Superintendent or principal. This person will guarantee he knows his people and they will do what he says. In most cases this adoption will usually be a minor or superficial change (a new kind of book, one or two classes, etc.). This is right out of Havelock. Very often this can be facilitated with little effort. Do it! Don't judge it. Put the client in touch with D/D. Make a follow-up call and then wait to be contacted. Insisting a client go through a long involved process for a simple change, when the client does not want to get so involved, it counterproductive. Everyone's happy and that's what counts.

Phase I Owning the Problem

C. Making Decisions

The last portion of Phase I is assisting the client to make a decision to try. This is very important and often the most neglected part of facilitating. There comes a time when you have to put a stop to the "Yes, but!" and decide to do something. The time will vary by client. The facilitator must monitor the process. Sometimes it will happen almost automatically and other times it takes a little push. There are activities that can be done to assist this process. Many of these activities will require that the facilitator team must receive training (i.e. conflict management). However, there does exist at universities, regional laboratories, private and non profit organzations persons who can assist the facilitator in making these activities available to clients. Giving the facilitator staff a chance to practice with these experts also facilitates their learning.

1. Opening Communications:

   If there is one statement most facilitators hear most often it is, "The people in this school (district) just don't talk to each other". What is probably closer to the truth is that they don't listen to each other. Conducting workshops or inservice on communication skills is helpful. Needs assessment, or search data or both, gathered earlier about the problem can be used as material for communication workshops. The client will usually appreciate this because, very often, the need for help on "What to do with the stuff" exists.

2. Team Decision Making:

   Most often the process started will require or at least encourage a broader base for decision making. More people will become involved. This usually develops the use of interfaced elements of the school (district) becoming involved. Often assistance in setting these up and providing planning help, along with team building skills, will be an important aid for district leaders. Workshops on team building tend to provide assistance for the district staff. It most often helps them to see one another in a better light.

3. Conflict Management:

   The almost inevitable result of this process with schools is that problems and disagreements (conflict) occur. Workshops and training in consensus building, group processing, brainstorming, prioritizing, planning and other skills already mentioned enable a school (district) to learn their way through the process with a minimum of disruption. Previously collected data about the organization should determine who gets this training. It is always best to get as wide a range of roles (interfacing) as possible.

4. Making a Fit:

During the latter parts of Phase I, it may become necessary to assist the client in selecting from two or three solutions (products) that appear to match the identified need (s). A good fit is related to the curriculum needs, as well as the organizational needs of the client. At this time, a visit to a site where the proposed solution(s) are functioning is helpful in gathering more data on a fit. Also, attending awareness meetings by the developer(s) can provide better insight for the client (teams) as to the match. This is also a time when the first tenuous relationship between developer and client takes place. The facilitator should assist with each smelling each others territory, so that all egos remain in tack. The two most important facts of a facilitators life are the client and the developer, The interfacing (LINKing) of these two elements are, after, all what the facilitator is all about. While we are operating a client directed system, the importance of quality developers is vital for sucess. Regardless of all the other things we do, if at the end of that there is not a solution to the clients problem that works, then what good was it?

5. Change Strategies:

During the course of working with the clients, some local people will have emerged as natural leaders in this adoption. These people can exist in any number of different roles in the school or district. The facilitator should be on the lookout for these local "LINKers" from the beginning. When these persons are identified, the facilitator should provide some of the training and assistance in facilitating change that is given to the facilitator staff. If these people can be found and trained, it provides a regular on-site assistance to the school and district in making the change. If these natural leaders do not emerge, then there is a problem that has not been identified and it is wise to go slowly and examine your back trail. Finding those people and helping them become more effective and getting recognition has two major objectives: (1) It will greatly improved the chances of the current change being successful. (2) It leaves a client with the beginnings of a self-renewing process for his organization.

6. Making a Plan:

The final step in Phase I is a plan developed by the client, with collaboration from the facilitator and developer. Ownership by the client of this plan is essential. In the beginning, the goal was to get the client organization to own the problem.

Now begins the process of owning the solution. A plan that includes a total plan for the organization is essential. The facilitator and developer will have roles to play in this plan. Relationships regarding budgets, roles, concern, staff development training, and other key issues should be part of the plan.

Phase II - Owning The Solution

Phase II, "Owning the Solution", begins s shift in relationship and activity. Up to this point the facilitator has had high energy input and interaction with the client. Phase II begins a shift where the client organization begins to assume a bigger role, along with the developer, in energy output and effort. The facilitator's role is very important, but he/she must also realize that during this phase the pulling away process begins. In the final analysis, the client must assume the ownership of the new innovation. As in most human interactions, if you want to hold on, you must turn loose.

A. Developing Ownership with Secondary Owners:

Once a solution (new change) has been selected, consideration must be given to those in the organizational structure that have to own the solution also. Most often, it will not be the total school staff who must implement the new program. A new program may involve only part of the total staff. It is important that staff not directly involved in the new innovation become supportive. In any adoption there are many roles to be played by "others". These will vary according to the situation. Examples might be: (1) informal evaluators, (2) planning and advisory, (3) community support, (4) resources group, (5) development group, etc. Assisting the client to identify what these roles are and then helping to meet with these "others" and ask them to help plan and identify "their" role usually results in developing a good support system.

B. Developing Community Support:

If the suggested process has been followed in Phase I, some elements of the community have been involved at an awareness level. It is time to expand this activity. When a new activity is to be introduced in a school (district) it is usually a good survival tactic to advise the client to begin to expand and broaden community support. Using existing community support, presentations to such groups as the following should be made:

1. parents
2. civic groups
3. special interest groups
4. professional groups
5. Board of Education
6. others

The purpose of these meetings is to make these groups aware of the problem and proposed solution. These groups should be encouraged to determine the role they would like to play in assisting the implementation of the new program.

C. Training:

During this phase, the staff who is to have the most direct responsibility for implementing the new program is trained. More innovations have failed because of poor training of key staff than any other single factor. However, this is primarily a client/developer activity. The facilitator should make sure that all arrangements have been made and everyone is ready. A few days before training is to occur, both the client and the developer should be contacted to make sure that everyone is set and all major concerns have been addressed. Meeting people at airplanes, making sure the arrangements are o.k., and making sure that the people's needs are met, are all functions of the facilitator. Making sure the client knows about any special quirks on needs of the developer prior to the developer's arrival is common practice. Informing the developer about any special needs or special problems of the client before the developer arrives allows the developer to properly plan the training.

Our experience indicates that training at the site of the D/D or some other site is helpful as an in-depth awareness and concept builder. In some adoptions where the change will require minor organizational adjustments, that training may be sufficent. Where the change is one that requires more basic changes or larger groups (the staff of a whole school, all the people in certain areas in a district, etc.), it has generally been more effective for the training to occur at the client site. If adaptions are to take place, it is most helpful for the D/D to be on site with the client. While the facilitator cannot control this, as it is basically a decision between the client and the D/D, the facilitator should offer encouragement and help for this to occur. If is does not occur, and in the judgment of the facilitator it is important that it does occur, then other arrangements for this kind of thing ought to be made.

D. Promoting Client/Developer Relationships:

If the facilitator has done his job, the client will have a high regard for their relationship and will often call the facilitator for advice or help. If the client's concerns relate to the product, the facilitator should use the developer. The facilitator should refuse to become an expert on the product. Part of the moving away activity should be that the client assumes a larger role in the process. The facilitator should be a trouble shooter and communications opener. Invariably, there will be misunderstandings and various human conflicts that naturally arise. The facilitator monitors what is going on and assists in spotting these problems, making sure they do not become critical. Phone calls and short on-site visits with the client are good ways to do this. Do not take sides; facilitate the improved communications between client and developer.

E. Pre-trial Analysis:

Following the training, the facilitator should check with the developer and client that the initial trial of the product is ready to begin. Follow-up and Technical Assistance by the developer should be planned. The facilitator may have to assist in these T.A. plans. Further interaction between the client site and developer site may be needed. The facilitator needs to ease this happening with some help, either financial or advisory. The main purpose of Technical Assistance is to do whatever seems to be needed to give the client the best shot possible at being successful. This can be anything from getting research information to staff development to easing some organizational problems that are associated (political) to "just being there providing an atta/boy or atta/girl."

F. Support Your People:

Once the trial has begun, it is important that it be as successful as possible. When they fail, most trial programs fail in the first one to three months. Lack of success early-on will encourage a client to return to the old way. Lack of success can usually be identified as a result of one or more of; (1) insufficient training, (2) too high expectations, (3) organizational problems, (4) incompetent people, The facilitator should check (monitor) what is happening. It is wise to have feedback sessions with clients within one to two months of beginning the trail. If problems arise, (1), (2), (3) above, then help can be found from the D/D, facilitator staff or some other resource available. If the problem turns out to be (4) above, cut the losses and leave, being sure the client's ego and self-respect are intact. Incompetence usually occurs when a bad match has occurred. After things have settled down, it may be possible to come back and try to make a better match. How to identify if incompetence is the problem is difficult. There are no rules. However, as you listen to the client hear what is said not the words. If a good deal of avoidance behavior, (reason/excuses) why it won't work here, is exhibited then a bad match (incompetence) is probably indicated. If frustration and anxiety are exhibited (It's not what I thought, we can't seem to get it, I'm having a hard time) then 1, 2, or 3 are probably involved.

G. Individualizing the Adoption:

Although client success is the primary goal, it should never be forgotten that the developer (or trainer for an R&D) is a great resource for your system. What the D/D has, after all, is the training to make the chosen solution work. Usually, the interaction is such the the D/D has high ownership of his thing. The client is wanting to own this new solution also. Conflict is built into this situation. Basically, the D/D wants to have the recognition of an adoption, but it has to be done "right". The client wants the new thing, but it has to "fit our needs". Individualizing the adoption can be difficult when both client and resource insist on "total" ownership. The facilitator should monitor this activity closely. Frequent phone calls is one good method. Usually, the problem is lack of communication and hurt feelings. Listen to what is said carefully and respond to the situation rather that the words you hear. Don't make value judgements about who's right or wrong. Just make the client and the developer friends again.

H. Provide Recognition for the Client:

Once the trial seems on the way successfully, the facilitator takes one more step backward, It is now time for the client to really own the project and become the expert. Providing the client is willing, opportunities should be sought to go and tell the story. There are many kinds of meetings, workshops, etc., that are always looking for someone to come and talk about new programs. Let the client put his show on the road.

I. Evaluation:

Many programs have a built-in evaluation program that the client will use for the purpose of determing if the results obtained are similar to those obtained at or expected from the D/D or R&D project. This data can be used to assist the client. However, it should be remembered that this evaluation is for both the client and the resource system. Make sure that the client has input, in addition to that provided by the D/D, into evaluation concerning those things necessary for success at the adopter site. If the evaluation doesn't assist the client in gaining information and making better decisions, then he/she will not own the process. Evaluation is after all a management tool. Very often technical assistance in evaluation can be provided by the local university, facilitator staff, or both.

Phase III - Implementation

In the process of working with clients, the facilitator has started with high energy output and effort. The initial client input has been low. As the process continues the relationships change. As ownership increases, client energy and effort increases and facilitator decreases. Ideally, the successful facilitator will have worked himself to the point where the client say, "go away, we don't need you now".

A. Planning for Installation:

Near the end of the trial, it becomes necessary to plan for institutionalizing the D/D or R&D project. Also, by this time there should be a team of people who represent the decision makers for this adoption and who must carry the load of implementation. If the facilitator has done the work properly, this team can now plan for implementation. Depending on the district and/or the project, this plan could be simple or complex. The facilitator should be a counselor/encourager in this process. Whatever leadership has emerged in the distric, should assume the responsibility.

B. Budgeting and Approval:

Financing the installation is essential. In the final analysis, budgets represent priorities and on going activities. Internally, the leadership knows where and how existing funds can be funnelled into the new program. Often no new funds are needed. When additional financial help is needed, the facilitator should be aware of resources available outside the school district to assist. It is essential that the budgeting process is known so that time-lines and key decision makers are included. Getting to the barn after someone has already locked the door has stopped many an innovation.

C. Additional Training:

Often, if the new program is to be implemented, it involves moving the project to other sites in the district. What sites and who needs to be trained will vary, but needs to be determined. The actual training should be done by the local staff who were involved with the trial. Some assistance may be needed from the D/D but this support should be as limited as possible. Whatever needs to be done to develop ownership by other staff for the new project should be done. Very often the local school team should take other staff through a similar process to that which was done with the trial staff and team. The local team, this time, becomes the facilitators. The facilitator will probably have to serve as a resource finder, providing for special knowledges and skills that the local staff now "know" about, but feel they still lack the ability to teach it to others.

D. Community Support:

The facilitator should assist the local team in developing information/ dissemination materials for the local community and parents. Where possible and appropriate, a plan for involving the community whith the adoption should be integrated into the installation strategies. Remember, community involvement is a very sensitive area. Be very sensitive to what is said about the community. Also remember that the Superintendent, BOE and the formal organization consider this their special concern. Never forget to keep these people in leadership roles in community activities. Making the boss or the Board look good never hurt anyone.

E. Adaptation:

It has been our experience that no D/D or R&D project ever fits exactly as it was developed in any given site. Making a fit will require some communication between the developer and client. The client and developer should have developed a close enough relationship that working on the fit automatically happens. However, the facilitator should keep in touch, in case either party calls for help or assistance.

F. Encourage Client Demonstration Activity:

Once it seems that things are set, encourage the client to make himself available to other Kansas schools as a demonstration site for the new program. This may require some assistance and approval from the developer. Getting a client to serve as a demonstration site assists in fixing the adoption. If the client is going to be accountable for helping others, it is more likely that the adoption will be fixed. Also, it makes additional adoptions of the same D/D or R&D possible and more economical. Peer to peer has no peer.

SHUTTING UP

When all of the above fails and nothing seems to be working, you probably shouldn't be there in the first place. LEAVE!!!

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